National Aeronautics and Space Administration

NASA

SATERN

System for Administration, Training, and Educational Resources for NASA

Training Approvals

Classroom Guide
(Version 5.8 SP5)
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For SATERN Learning v 5.8 SP5

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From the NASA SATERN Program Office:

All SATERN administrator training materials must be used alongside the SATERN Rules and Process Guide for administrators. The Guide identifies areas where SATERN functionality cannot enforce the Agency-defined usage of the system at NASA and provides guidance to enable administrator compliance with Agency-defined methods and procedures.

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Course Introduction

Through discussion, demonstration, and hands-on computer lab work, this course teaches you the concepts and terminology associated with approvals in SATERN. The goal of this guide is to establish a working understanding of the concepts associated with the approval process for items and scheduled offerings. This guide is broken down into three lessons: Approval roles, approval processes, and applying approval processes to items and scheduled offerings.

OBJECTIVES

Upon completion of this course, you will be able to:

➢ Describe the capabilities of approval processes

➢ Create an approval role

➢ Assign an approval role to a learner

➢ Create an approval process

➢ Apply an approval process to an item

➢ Apply an approval process to a scheduled offering

TARGET AUDIENCE

This training is intended for SATERN administrators responsible for:

♦ Setting up approval processes in SATERN

♦ Assigning approval roles to learners

♦ Applying specific approval processes to items and scheduled offerings

USING THIS GUIDE

This classroom guide is designed to be used in conjunction with an instructor. The guide provides general information that will be elaborated upon by the instructor. For additional information, refer to the online help.

Throughout the guide, you encounter icons that call out various types of information. The following table illustrates how this guide uses icons to indicate different types of comments, activities, labs, etc. that support the text.

Icon	Definition
	Activity: Indicates an activity for you to complete that helps reinforce the information you just learned.
	Note or **Tip**: Indicates additional information that is related to the information presented. It also provides helpful hints and tips or other guidance that further explains the information it accompanies.
	Lab: Indicates a hands-on computer lab. Follow the step-by-step process outlined to perform specific tasks in the system.
	Warning: Warns against particular actions, or that a particular condition might indicate a problem.

ADDITIONAL RESOURCES

There are a number of additional resources that can provide you more information about the SATERN system. These resources include:

♦ Online SATERN system help

♦ Task-specific job aids

Notes

Lesson 1:
Approvals and Approval Roles

The goal of this lesson is to establish a general understanding of approvals and approval roles in SATERN.

OBJECTIVES

Upon completion of this lesson, you will be able to:

➢ Define an approval role

➢ Add a new approval role

➢ Assign an approval role to a learner

WHAT IS A TRAINING APPROVAL?

The approval process is a function in SATERN in which administrators can utilize one of the many approval processes to meet their requirements.

NASA Business Rule

The creation of the approval roles and approval processes is completed by the NSSC with the approval of the Executive Committee.

An approval process can be applied to items (including online items) or to scheduled offerings. It can be created to include one approval step or as many as six.

APPROVAL PROCESS SETUP

In order to use the approval process, several setup steps must be completed (Figure 1). These include:

1. Creating approval roles.

2. Assigning approval roles to learners.

3. Creating approval processes.

4. Applying approval processes to items/scheduled offerings.
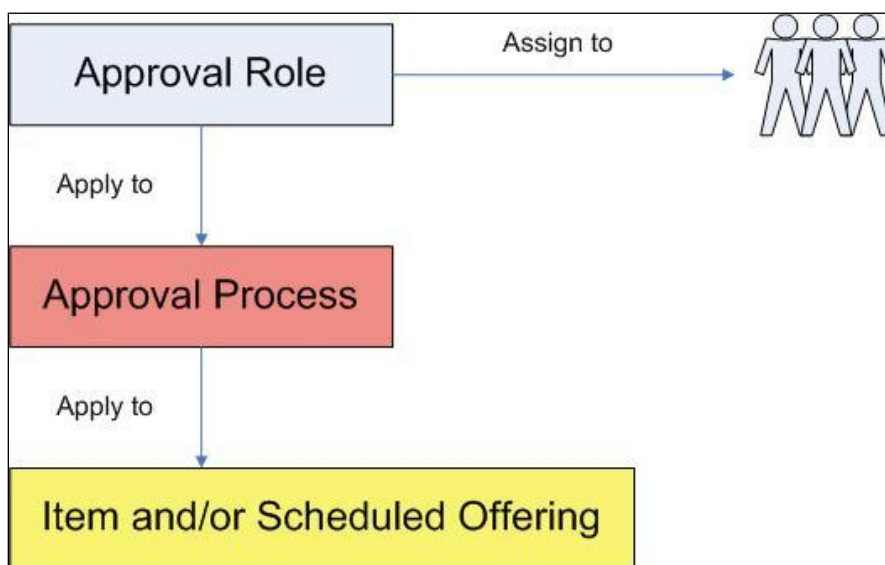
5. Configuring the notification text (if desired).

Figure 1. Approval Process Setup

APPROVAL ROLES

To enable self-registration in SATERN, administrators populate approval roles that correspond to steps in the approval process that they wish to use. For any item or scheduled offering, an approval process can be assigned so that learners can self-register for the course by automatically starting the appropriate approvals that are needed for attendance.

Administrators can identify all the potential approvers as one certain role; which means that each potential approver listed as that role receives an email when that step in the approval process is reached. In practice however, receiving emails that are not for you can be annoying.

To enable additional flexibility for administrators at the centers who wish to more accurately identify the specific approver(s) who handle a certain course or course type, the approval roles shown in Figure 2 were created. Now Center Training Offices can use 20 unique Training Office Specialist roles for their staff, effectively eliminating approval requests that are not intended for them.

Figure 2. Training Office Approval Roles

For example, if a center uses the two-step approval process, (Supervisor/Training Office Specialist), any learner who self-registers for the item or scheduled offering triggers an email to anyone who has the learner's domain restriction and the role of Training Office Specialist. Using listed approval roles means that

you can identify exactly who the correct person is (up to 20) who should be approving enrollments for that particular item or scheduled offering. Remember that using these approval roles only work if you select the approval process that contains the desired approval role that you have pre-populated.

ADDING A NEW APPROVAL ROLE

An *approval role* is a role that can be assigned to a learner for participation in the approval process as a training approver. Approval roles **are created by the NSSC** as a reference and require an ID. Entering a description is also strongly recommended.

The default approval role for SATERN is *1st Line Supervisor*. This role, when used in an approval process, links to a learner's direct supervisor (1st Line) (Figure 3).

Figure 3. Approval Role

Lab 1.   Adding a New Approval Role – Performed by NSSC

Step

1.   Navigate to **System Admin > References > Approval Roles**.

2.   Click **Add New**.

3.   Enter an approval role ID.

4.   Enter a description for the approval role.

5.   Click the **Add** button.

APPLYING AN APPROVAL ROLE TO A LEARNER

Once created, an approval role should be applied to a learner or learners. A learner can have multiple approval roles assigned to him/her, and each assigned approval role can be domain controlled, so the learner only acts as the approver for learners in the selected domain(s).

Example:

Joe is a Training Coordinator – KSC Domain

Susan is a Training Coordinator – ARC Domain

Keith is a Training Coordinator – DFRC Domain

All three people have the same approval role (Training Coordinator), but they each have approver rights for a different set of learners because of the domains selected when the role was added to their learner record (Figure 4).

Note: If more than one learner is assigned an approval role and given access to the same domain, any of those individuals can act as the approver of a learner's pending approval.

Figure 4. Approval Role Tab: Learner Record

Table 1 provides some examples of approval roles at NASA.

Table 1. Examples of NASA Approval Roles

Examples of NASA Approval Roles
Supervisor 1
Learning Center
Training Office
Training Coordinator
Human Resource Development Rep
NSSC
AGENCY
Host Center Training Office

Lab 2. Assigning an Approval Role to a Learner

Step

1. Navigate to **Learner Management > Learners**.

2. Enter search criteria to search for the appropriate learner record.

3. Click **Search**.

4. Click the **edit icon** to access the learner record in edit mode.

5. Select the **Approval Role** tab.

6. Enter an approval role ID.

7. Click the **Add** button.

Note: *You can also click* **add one or more from list** *to search for the approval role to add.*

8. Review the assignment in the Assign Approval Roles to the Learner section.

9. Click the **Control Domains** link.

10. Enter a domain ID.

11. Click the **Add** button.

12. Check the **Include Sub Domain** checkbox.

13. Click the **Submit** button.

14. Click the **Return to Approval Role** button.

15. Click the **Apply Changes** button.

Note: *If you do not perform this step, the approval role will not be assigned to the learner.*

CONCLUSION

In this lesson, you learned how the NSSC adds an approval role to SATERN and how to assign it to learners.

You should now be able to:

➢ Define an approval role

➢ Add a new approval role

➢ Assign an approval role to a learner

In Lesson 2, you will see the steps taken by NSSC to create an approval process and apply the approval roles to the process.

LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. An approval role is assigned to a(n)
   a) Item
   b) Scheduled offering
   c) Learner
   d) None of the above

2. What must be selected when an approval role is assigned?

   _____

   _____

   _____

   _____

   _____

Lesson 2:
Approval Processes

The goal of this lesson is to establish a general understanding of approval processes.

OBJECTIVES
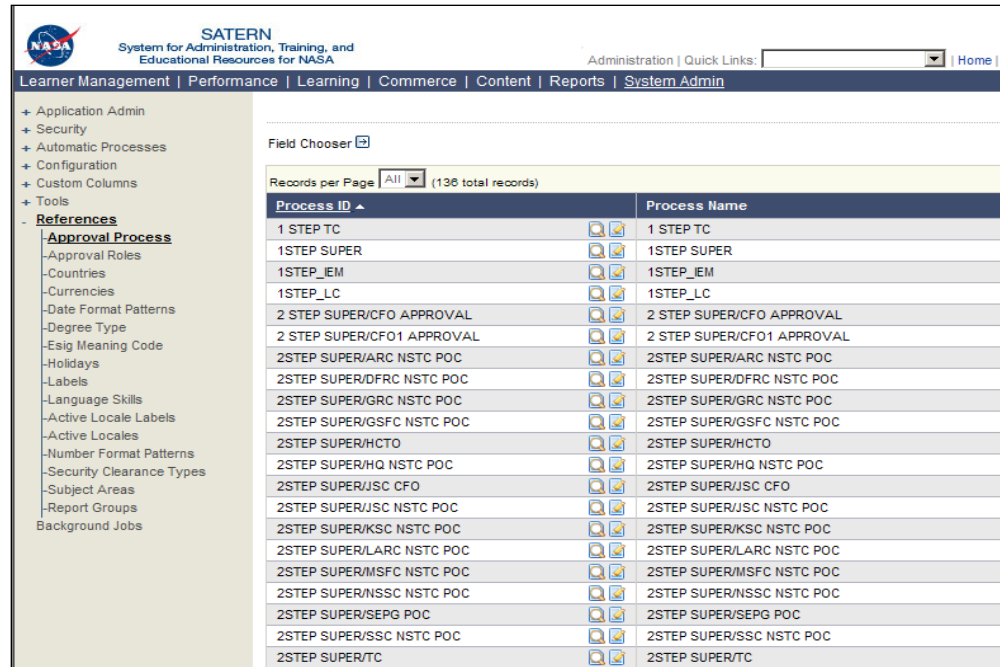
Upon completion of this lesson, you will be able to:

➢ Define an approval process

➢ Add a new approval process

➢ Assign an approval role to an approval process

APPROVAL PROCESS

An approval process is a set of approval levels a learner must go through before enrollment in a scheduled offering or launch of an online item can be completed. An approval process prevents learners from launching an online item or registering for a scheduled offering without obtaining proper approval. Instead, each learner must go through the company/agency-defined approval process assigned to that item.

In addition to the new approval processes available to you, the previously defined approval processes are still available for use at your center. The new approval processes are shown in Figure 5.

Figure 5. New Approval Processes

Caution: Administrators who wish to utilize these approval roles and corresponding approval processes should track who in the Training Office has which approval role number. This will help to ensure that the approval process used is the correct one. Confusion and delay for learners could result if a mistake occurs.

Note: If your center would like to utilize other approval processes that are not currently defined in SATERN, you must call the Help Desk at 1-877-NSSC-123 to have those configured and created for use. (New roles can only be requested by a Center or Discipline SAL.)

As an example, if you have an approval process that incorporates two approval roles that aren't in a sequence currently defined in SATERN, the Help Desk can create an approval process that will meet your business need. Keep in mind that approval roles and approval processes are available across the Agency, so be sure to verify that your needs are met with the current configuration prior to calling the Help Desk.

ADDING A NEW PROCESS

An approval process **is created by the NSSC after approval from the Executive Committee** through the References menu and requires an ID. Entering a process name is also recommended.

Once the approval process is created, the NSSC defines a step and identifies one or more approval roles and/or specific learners as the approvers for that step. Any learner with that approval role assigned to his/her record becomes an approver whenever this approval process is used with an item or scheduled offering. Each approval process can have up to six approval steps (Figure 6).

Figure 6. Approval Process

Lab 3.   Adding a New Approval Process – Performed by NSSC

Step

1.   Navigate to **System Admin > References > Approval Process**.

2.   Click **Add New**.

3.   Enter a process ID.

4.   Enter a process name.

5.   Select a domain.

6.   Enter a process owner e-mail.

Note: The individual responsible for maintaining this process.

7.   Click the **Next** button.

8.   Enter a step name.

Note: This is under the Process ID information at the top of the page.

9.   Click the **add one or more from list** link.

10.   Enter search criteria to search for and select an Approval Role ID.

*Note: Make sure to check the **Add** checkbox before clicking the **Add** button.*

11.   Click the **Next Step** button.

12.   Enter a step name.

Note: This is under the Process ID information at the top of the page.

13.   Click **add one or more from list**.

14.   Enter search criteria to search for and select an Approval Role ID.

*Note: Make sure to check the **Add** checkbox before clicking the **Add** button.*

15.   Click the **Finish** button.

16.   Review the process steps as necessary.

17.   Click the **Create Process** button.

CONCLUSION

In this lesson, you learned how the NSSC creates an approval process. You also learned how to apply an approval role or learner to each step in the process.

You should now be able to:

➢ Define an approval process

➢ Add a new approval process

➢ Assign an approval role to an approval process

In Lesson 3, you will apply the approval process to an item and scheduled offering.

LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. What is the maximum number of steps an approval process can have?
   a) 2
   b) 4
   c) 6
   d) Unlimited

2. True or false
   You must assign an approval role to each step in the approval process.

Notes

Lesson 3:
Applying an Approval Process

The goal of this lesson is to establish a general understanding of how to apply an approval process.

OBJECTIVES

Upon completion of this lesson, you will be able to:

➢ Apply an approval process to an item

➢ Apply an approval process to a scheduled offering

➢ Define the entire approval process

APPLYING AN APPROVAL PROCESS TO AN ITEM

Once an approval process has been added to the database **by the NSSC**, it can be applied to items and scheduled offerings. Each item and scheduled offering can have only one approval process assigned to it at a time. Approval processes assigned at the item level can be modified at the scheduled offering level.

At the item level, an approval process is established by selecting an approval process ID and checking the **Approval Required** checkbox on the Summary tab of the item record. If the item is classified as an online item, a learner will not be able to launch the item until the approval process has been completed with an *Approved* status. If the item is classified as instructor-led, and a learner attempts to self-register for an available offering, he/she

receives a status of *Pending* until the approval process has been completed with an *Approved* status (Figure 7).

Figure 7. Approval Process: Item Record

Lab 4.   Assigning an Approval Process to an Item

Step

1.   Navigate to **Learning > Items**.

2.   Enter search criteria to search for an item.

3.   Click **Search**.

4.   Click the **edit icon** to access the item record in edit mode.

5.   On the item Summary tab, select an approval process from **Approval Process ID** drop-down menu.

6.   Click to check the **Approval Required** checkbox.

7.   Click the **Apply Changes** button.

APPLYING AN APPROVAL PROCESS TO A SCHEDULED OFFERING

Administrators can add an approval process to a scheduled offering if one wasn't added at the item level. If an item approval process default was set at the item level, the admin may change or remove the default process (Figure 8).

Figure 8. Approval Process: Scheduled Offering Record

In order to engage the approval process, both the **Approval Required** and the **Self-Registration** checkboxes (in the *Edit the Registration for the Scheduled Offering* section at the bottom of the Summary tab) on the Summary tab must be selected.

THE APPROVAL PROCESS

When a learner attempts to register for a scheduled offering for which approval is required, he/she must complete a registration request. Depending on the approval roles involved, the learner might have to select learners to perform the approval (Figure 9).

Figure 9. Learner Interface: Registration

In order for a learner to be enrolled into the scheduled offering pictured in Figure 9, the learner must be approved by both his/her first level supervisor and Training Office Specialist 2.

Once the approval process is engaged, the supervisor is notified via e-mail and an alert text on his/her SATERN Learning learner Home page (Figure 10). If the supervisor approves the request, the process moves to the second step where the Training Office Specialist 2 is sent an e-mail notification and sees an alert on his/her Home page as well. If the Training Office Specialist 2 approves the request, the approval process is complete and the learner is enrolled into the scheduled offering. Learners are also notified as the process moves through the approval steps and they receive a final e-mail confirming their registration in the scheduled offering.
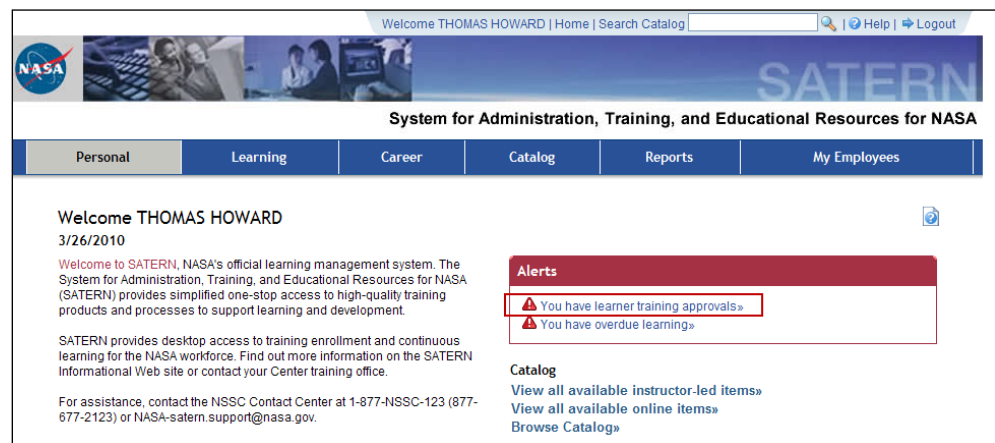

Figure 10. Training Approval Alert on Home Page

Clicking the **You have learner training approvals** alert text takes the approver to the *Pending Reviews and Approvals* screen (Figure 11). From this screen, approvers can approve or deny the pending approval and enter comments for their decision. If the request is approved, it moves onto the next step, such as Training Office Specialist 2. If the request is denied at any step in the process, the approval process is stopped and the learner would

have to resubmit the request to attempt to get into the scheduled offering in the future. The **Skip** option allows an approver to put off a final decision until a later time.

Note: If the approver changes (i.e., learner is under a new supervisor), the pending approval automatically reroutes to the new approver.

Figure 11. Pending Reviews and Approvals Screen

NASA Business Rule

♦ If a learner's supervisor is unavailable to approve the scheduled offering and/or external training request in a timely manner, the Center Level 1 Administrator can approve the training with a written authorization (e-mail) from the learner's supervisor to approve the training for the learner.

♦ The administrator should use the comments field to include remarks that reflect that the approval was made by the Level 1 Administrator on behalf of the supervisor. Administrators should not "super-approve" the Training Office step, because Training Codes cannot be entered.

NOTIFICATIONS GENERATED BY SATERN

Figure 12 displays a notification the learner receives after submitting his/her request for approval into the scheduled offering.

This notification informs the learner again of the steps required to approve the request.
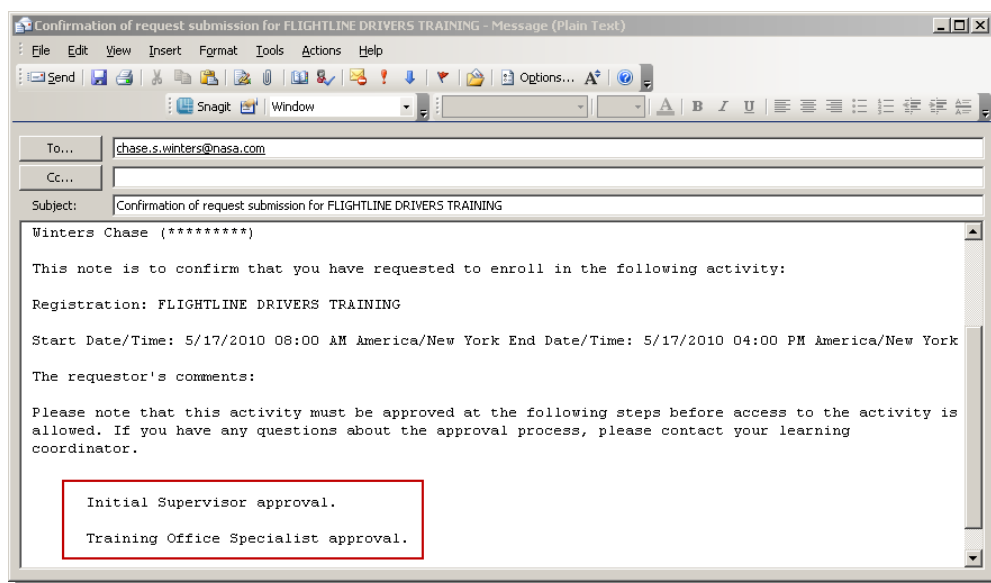

Figure 12. Confirmation of Request Submission by Learner

Figure 13 displays a notification the learner receives after the initial supervisor has approved the request and the process is moving to the Training Office Specialist 2.
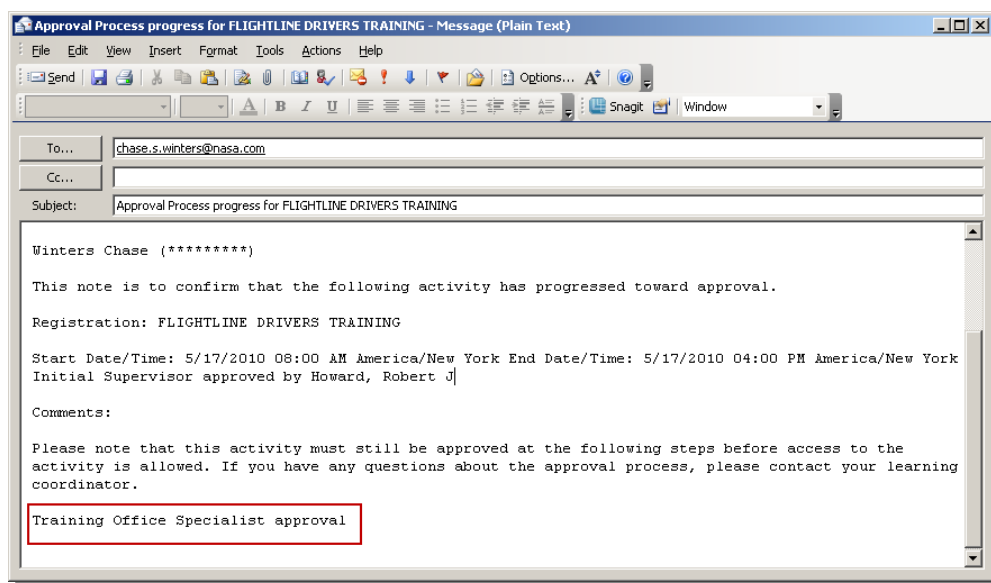

Figure 13. New Step Reached in Approval Process

Figure 14 displays a notification the learner receives after the request has made it through the entire approval process successfully and the learner has been enrolled into the scheduled offering.
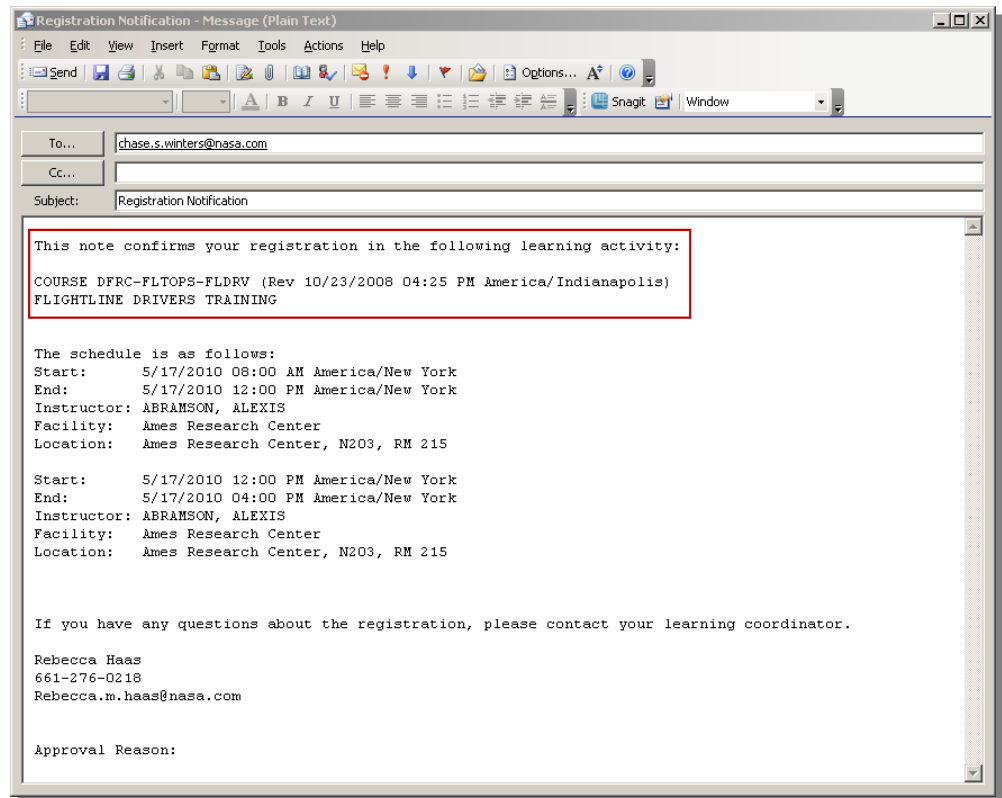

Figure 14. Registration Confirmation

CONCLUSION

In this lesson, you learned how to apply an approval process to an item and a scheduled offering, and how to complete the approval process as an approver using SATERN Learning.

You should now be able to:

➢ Apply an approval process to an item

➢ Apply an approval process to a scheduled offering

➢ Define the entire approval process

LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. True or false:
    If an approval process is set at the item level, it must be used at the scheduled offering level.

2. True or false:
    A learner who has been assigned Training Coordinator can approve all learners who attempt to launch an online item with an approval process assigned to it and that includes Training Coordinator.

Notes

Notes